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A historical community approach to social homogamy in the past

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ABSTRACT

This special issue is devoted to the theme of social homogamy, i.e. the likelihood of an individual marrying someone with the same social status, in past times. This introduction aims to situate each article within a broader framework of what unites this collection: a historical community approach to social homogamy in the past. This approach infuses sociological and historical theories in the historical debates on social homogamy. It does so using state-of-the-art research designs, with comparably coded large-scale datasets both on individuals and their families, as well as on the characteristics of the communities they lived in. Such a multi-level approach is deemed valuable as the communities considerably influenced marriage patterns.

1. Introduction

The structure of this introduction is as follows. First, we briefly present a broad theoretical overview of determinants of social homogamy in the past. Second, we present a bird's-eye view of the multi-level research designs employed in the historical community approach to social homogamy in historical societies. Third, we highlight some of the more salient achievements of the individual articles. Fourth, we look ahead, as far as we currently can, to consider the future of this approach.

2. A succinct theoretical framework to study who married whom according to social status

Marriage is influenced by personal and structural factors broadly captured in three groups: characteristics of the marriage market, personal characteristics and preferences, and preferences of third parties such as the Church, the community, parents, and peers (Abramitzky, Delavande, & Vasconcelos, 2011; Bull, 2005; Dribe & Lundh, 2005; Kalmijn, 1991, 1998; Schwartz, 2013; van Leeuwen & Maas, 2005). These factors vary across countries, regions, and communities, and they have varied over time. Table 1 shows some of the major factors, and how they have changed over the past two centuries.

In order to marry, there must be potential partners in view. This pool of potential partners is often referred to as a 'marriage market'. These pools vary in geographical scope – the marriage horizon – and in the availability of potential marriage partners within that

Table 1. Hypotheses on changes in social homogamy over the past two centuries.

			Effect on social homogamy	Global changes in macro char-acteristics over time	Resulting changes in social homo-gamy over time
Marriage market	Marriage horizons	Means of communication and transport	-	+	-
		Conscription	-	+	-
	Likelihood of meeting someone from another class	Universal education	-	+	-
		Associational life	+	+	+
		Ethnic/religious diversity (cross-cutting circles)	-	?	?
		Modern labor market	-	+	-
		Spatial social segregation	+	?	?
Third-party pressures, and the ability to withstand those	Social pressure	Parental control	+	-	-
		Communal traditions	+	-	-
		Peer group control	+	?	?
		Adult mortality	-	-	+
	Personal autonomy	Economic independence at early age	-	+	-
		Social security schemes	-	+	-
Personal preferences		Notions of romantic love	-	+	-

Source: van Leeuwen and Maas (2005).

geographical scope – i.e. in the likelihood of meeting someone with certain attractive characteristics. The larger the pool, the greater the likelihood one will meet not just people similar to oneself. For example, the easier it is to travel over greater distances, the greater the number of potential marriage candidates and the greater the variance in their character-istics. And being able to write or use a phone facilitates making and keeping contact with potential partners. The improvements in means of communication and transport that took place over the past 200 years are thus thought to have decreased social homogamy. Most of the other factors characterizing the 'marriage market' probably caused such a decrease as well. The main exception is the rise of associational life in all kinds of clubs, scouting bodies, religious organizations, etc. These associations are generally rather homogeneous with respect to social status and thus increase the likelihood of meeting potential marriage candidates similar to oneself. Changes in ethnic and religious diversity might be an excep-tion as well. If a middle-class Catholic youngster has to choose between marrying down but marrying a Catholic, or marrying within the middle class but marrying a Protestant, either religious or class heterogamy will be the result.

The second group of determinants of social homogamy in Table 1 is related to pressure by parents, peers, and others to marry homogamously, and the personal space individuals have to withstand such pressure. For example, the influence of com-munal institutions, notably the Church, has diminished since the end of the eighteenth century. At the same time, the rise of factories meant that young people became economically independent of their parents at an earlier age, and were thus in a better position to choose the partner of their choice, rather than the one preferred by their family of origin.

The third group of determinants relates to personal preferences. They cannot, of course, be completely separated from the other groups of determinants. We have already men-tioned the dilemma faced by someone who wishes to marry a partner of the same religion

and of the same class. The most important development in personal preferences over the past two centuries has probably been the rise of 'romantic love'. Basically, this is the wish to marry out of love even if it means looking outside one's social class of origin, outside of a traditional marriage market, and outside of what parents prefer.

This short introduction to the historical determinants of social homogamy makes clear that there are many of those. However, how they work and how they have changed over time is usually discussed in the context of three theories: modernization theory, the romantic love hypothesis, and the theory of cross-cutting circles. These theories loom large in this collection of essays as well.

According to *modernization theory* the social and economic modernization we have witnessed in the past two centuries has led to more socially fluid societies, diminishing the grip of the family of origin on the marital choices of their children. Proponents of modernization theory assume an ongoing reduction in the importance of ascribed characteristics – such as status of the family of origin – in favor of achieved characteristics. (Treiman, 1970; for reviews see Knigge, Maas, & van Leeuwen, 2014; van de Putte, 2005; Zijdeman & Maas, 2010). In a traditional society, the best predictor of the future earnings capacity of young adults was that of family of origin. The status of the father of the groom was an important predictor of the success of the groom later in life. In industrializing societies the status of the groom himself increasingly became the better predictor of his future success. In an agricultural society, the size of the parental farm was a strong predictor of the future well-being of the son who inherited the farm, and of the woman marrying that son. However, in a society where a growing proportion of the population labored in industry or service things were different. The groom's own 'achieved' status was more salient for evaluating his future material prospects and thus more decisive when choosing a partner than his 'ascribed' status – i.e. that of his father.

Modernization theory also states that, overall, the pressure of the community has decreased. In the words of Goode (1964, p. 108–109):

> With industrialization, the traditional family systems are breaking down … Elders no longer control the major new economic or political opportunities, so that family authority slips from the hands of such family leaders. The young groom can obtain his bride on his own, and need not obey anyone outside their family unit, since only the performance on the job is relevant for their advancement. They need not rely on family elders for job instruction, since schools, the factory, or the plantation or mine will teach them the new skills … Nor do they even need to continue working on the land, still in the possession of the elders, since the jobs and the political opportunity are in the city. Thus industrialization is likely to undermine gradually the traditional systems of family control.

Industrialization thus offered young people work with wages that allowed them to escape the influence of the parental household (Shorter, 1975; Tilly & Scott, 1978; Treiman, 1970). Not only did children become less dependent on parents, the reverse was also true as social security schemes made parents less dependent on their children. They could increasingly afford to let their children marry whomever they wanted, because they no longer needed their children for their own future material well-being.

Thus, with regard to temporal variation, modernization theory predicts that during modernization a shift took place from homogamy on fathers' status to homogamy on

children's status, and that, with regard to spatial variation, in more modern communities homogamy by father's status is less likely and homogamy by children's status more likely than in more traditional communities. Despite more or less continuous anxiety among historians on the generality and simplicity – and if not specified, also the vagueness – of modernization theory, it allows us to derive testable hypotheses. The historical record will, of course, have the last word on this or any other theory.

The *romantic love hypothesis* can be seen as a cultural variant of the economic modernization theory discussed above, relating to changes in preferences. Shorter (1975, p. 148) has been its most vocal proponent: '[T]he most important change in nineteenth- and twentieth-century courtship has been the surge of sentiment … People started to place affection and personal compatibility at the top of the list of criteria in choosing marriage partners. These new standards became articulated as romantic love.' And: 'Once the heart began to speak, it would give instructions often entirely incompatible with the rational principles of family interest and material survival on which the small community was ordered. Marry the woman you love, the heart might say, even though your parents disapprove' (Shorter, 1975, p. 120–121). Whereas the economic modernization theory predicts a shift from homogamy on parental status to homogamy on children's status, according to the romantic love hypothesis both types of homogamy declined with modernization and were less likely in more modern communities.

According to the theory of *cross-cutting circles* people are rooted not only in social class, but also in communities based on other salient social divides, notably ethnicity, migration status, language, and religion (Blau, Beeker, & Fitzpatrick, 1984; Blau & Schwartz, 1984; Heerma van Voss & van der Linden, 2002; Puschmann, Grönberg, Schumacher, & Matthijs, 2014). When applied to marital choices, the theory of cross-cutting circles points at the effects of network divisions that cross-cut status divisions – i.e. cross-cutting circles. As an example, a major dilemma people might face is whether to marry someone with a lower status within their own group, or to marry someone of equal status outside their own group. Cross-cutting circles generally weaken homogamy on both dimensions, but least so with respect to divisions deemed very important. The consequences of cross-cutting circles for status homogamy can, for example, be studied in confessionally divided Hungary and the Netherlands, or in linguistically divided Belgium. Developments in cross-cutting circles can coincide with those in socio-economic or cultural modernization, in ways that complicate testing the last two theories. Religion, for example, has generally become less important over the past two centuries – but not always and not everywhere. For example, due to 'pillarization' the relevance of religion for individual lives peaked in the first half of the twentieth century in the Netherlands.

The articles in this special issue (as well some other articles, e.g. Bras & Kok, 2005; Dribe & Lundh, 2005) all test the theoretical arguments summarized in Table 1, and specifically focus on one or more of the three theories we have just discussed (modernization, romantic love, and cross-cutting circles).

Seiler (2019 - this issue), for instance, tests economic modernization theory on parts of Switzerland. He asks whether individuals in modern communities are more likely to marry out of their social class of origin than those in more traditional ones. To the classic modernization theory, he adds hypotheses on the effects of marriage restrictions, which at that time were not uncommon in German-speaking parts of Europe. Local and central

authorities in Switzerland reinforced existing marriage restrictions with the aim of preventing reproduction among the poor (Head-König, 1993; Mantl, 1999). He expects the strengthening of marriage restrictions to have counteracted the general decrease in the importance of social origin over the course of modernization. Seiler is the first to test quantitatively the confounding effect of marriage restrictions on social homogamy during modernization.

Maas and van Leeuwen (2019-this issue) juxtapose the status-attainment hypothesis – derived from economic modernization theory – and the romantic love hypothesis (following Smits, Ultee, & Lammers, 1998, 2000). Whereas the first hypothesis states that achieved status increased and ascribed status decreased in importance during the nineteenth century, especially in regions that experienced more modernization, the latter predicts that modernization caused a decrease in the importance of both ascribed and achieved status. Smits et al. (1998) assumed that the growing importance of achieved characteristics in the labor market preceded the rise of romantic love, but they lacked appropriate historical data to test this. Maas and van Leeuwen do so using data on marriages in Dutch communities during modernization.

Van Leeuwen, Maas, Hin, and Matthijs (2019-this issue) look at the effects of cross-cutting circles in the linguistically split (Dutch and French) communities in Belgium on marriage patterns in a period of social and economic modernization. Whereas linguistic barriers remained strong during 1821–1913, at the same time Belgium underwent a process of rapid modernization. Belgium was the first industrial nation on the European continent – and indeed the second industrial nation on earth after Britain – and in the course of the long nineteenth-century modernization accelerated, powered by the rapid increase in the use of steam power. This period saw a decrease in the proportion of the population working in agriculture, and an increase in the dissemination of letters, telegrams, newspapers, and other forms of communication, and, last but not least, rapid growth in the size of the railway network. Van Leeuwen et al. look at the combined effect of cross-cutting circles and modernization, and formulate various hypotheses, such as if bride and groom were raised with a different language, both homogamy by father's status and homogamy by groom's status would be stronger than if they were raised with the same language.

Lippényi et al. (2019-this issue) also investigate the effects of cross-cutting circles, this time in the religiously diverse Hungarian society, 1870–1950. The question they address is which components, if any, of the differences in social homogamy (over time and between communities) can be explained by variations in modernization, and which by cross-cutting religious circles. Hungary was strongly divided by religion. Young men and women looking for a partner within their own local and heterogeneous marriage market might have had to sacrifice a preference for a same status partner to their preference for someone from their own religious group, or vice versa. Protestant inhabitants of a Catholic community might have faced the dilemma of either marrying downward someone of the same religion, or marrying someone of their social status but another religion. Lippényi et al. formulate the hypothesis that a larger share of marriage candidates from the same religious group in a community is associated with higher levels of homogamy by both father's status and groom's status.

Roikonen and Häkkinen (2019-this issue) also test modernization theory on a late industrializing country, Finland, by studying the effects of industrialization and

urbanization on social homogamy. They consider cross-cutting linguistic divides by studying the effects of the presence of a Finnish-speaking versus Swedish-speaking population in a community.

3. Multi-level research designs with large-scale, comparably coded data on both individuals and communities

Individuals are born into families and genealogies, rooted in villages and towns that are in turn parts of regions and countries with, for example, varying degrees of industrialization, means of transport, and religious or language divides. One might thus distinguish various levels of historical data, as do the articles in this special issue (see also Jones, van Leeuwen, & Broadberry, 2012). At the lowest, individual level, the articles relate to the marital choices of large numbers of usually young women and men, as revealed by marriage certificates. While such historical datasets now span large parts of the globe, most still relate to Europe – though not just Western Europe, as the articles on Hungary and Finland illustrate. These certificates are an efficient source to study marital homogamy, as they contain data on the occupations of the groom, his father, if one is lucky also the bride, and usually that of her father. They do not contain information on those who did not marry – although the unmarried might have engaged in serious relationships to which the theories discussed earlier might also apply. The certificates contain far less information on the occupations of women (brides, their mothers, and mothers-in-law) than men, although more than is often thought, at least in certain places and historical periods.

Occupations are to historians, demographers, and sociologists what income and wealth are to economists: the common coin to capture and compare social status (see e.g. van Leeuwen & Maas, 2010). And vital registers contain occupational information in abundance; it is sometimes obscure, and often recorded in a bewildering array of orthographic varieties. But concurrent with the rise of large historical databases, large collections of commonly coded historical occupational titles have now become available. It seems fair to say that the standard classification for historical occupational titles across the globe is now HISCO (van Leeuwen, Maas, & Miles, 2002, 2004). The presence of many large datasets with occupations coded into HISCO facilitates the use of HISCO-based measures of social class and social status greatly. Once coded in HISCO, a simple recode is enough to obtain the position of an individual's occupation in a larger-class scheme (HISCLASS, see van Leeuwen & Maas, 2011) or a micro-class scheme (see Griffiths, Lambert, Zijdeman, van Leeuwen, & Maas, 2018). This way, one can comparatively analyze social homogamy from a class perspective. In this special issue, status homogamy is analyzed using an international hierarchical status scale – the HISCO-based HISCAM scale (Lambert, Zijdeman, van Leeuwen, Maas, & Prandy, 2013).

The main challenge at present is to collect comparable data on the communities individuals live in. Such data are of substantive interest if we want to study the effects of economic and cultural modernization and cross-cutting circles on partner choices. Communities often constitute a meaningful geographical area, being the space historical actors lived in and were most influenced by. Processes such as the rise of romantic love, the introduction of new jobs for which one does not need parental help, educational expansion, transport options to expand the marriage horizon, the existence of

cross-cutting circles, or customs guiding partner choice often operate at that level. Furthermore, the use of data at the community level allows one to make good use of both the geographical and temporal variation in explanatory factors, more so than when within-country regional variation is ignored. All the articles in this special issue have carefully collected community data. However, it is fair to say that at present there is much more harmonization at the individual-data level than at the level of community data.

Having data at different levels (individuals, families, communities, countries), one needs multi-level models to disentangle the effects of processes that play out at these different levels. Fortunately, statistical methods exist that allow one to do this (e.g. Snijders & Bosker, 1999). These models make good use of both temporal and spatial variation at the macro level and individual variation at the micro level. Although these models have not, so far, often been applied in historical studies, this will no doubt change fast.

All the articles in this special issue estimate individual and community effects on the marital behavior of their historical populations. Seiler uses a multi-level design with measured community characteristics. In particular, he compares the Swiss cantons of Lucerne (which had an industrializing and agrarian part) with Glarus (with factory-based textile production). He measures the proportion of the population being factory workers and uses the presence or absence of a railway station as an indicator of being connected to the outside world.

Van Leeuwen et al. analyze data for communities in the province of what is now Flemish Brabant and the Brussels Capital Region, in the period 1821–1913. They, too, use a multi-level design with measured community characteristics. Their couple data come from civil registration records in Flemish Brabant 1821–1913 (N = 333,729), and their context data from censuses and other sources on the municipality at the time of marriage for the period 1859–1910. They spent considerable effort on sensitivity analyses because of incomplete data, notably in Brussels but also in some other parishes (in part owing to data loss during World War 1, and also because data collection is still ongoing). The community data they use are the number of post offices, the presence of a train station, and the population size in the municipality in a given year.

Maas and van Leeuwen also apply a multi-level design, estimating multi-level regression models with status of bride's father as the dependent variable. For this, they use on the one hand data on all marriages that took place in all municipalities in six (out of 11) Dutch provinces between 1813 and 1922, and on the other hand municipal-level data on dimensions of modernization. These dimensions were industrialization (number of steam engines), educational expansion (children in secondary education), urbanization, mass communication (presence of a post office), and mass transport (presence of a train station).

Roikonen and Häkkinen employ a logistic regression model on marrying heterogamously in Finland with both individual- and community-level variables. At the individual level they consider the father's and groom's status, but they also look at additional variables, for example being born out of wedlock. At the community level, they have gathered parish data on migration, linguistic divisions, and the proportion of the population in receipt of poor relief (as an indicator of poverty).

Lippényi et al. also estimate multi-level regression models with both community- and individual-level data. The individual-level data come from marriage records in 62

municipalities in present-day Hungary kept by Catholic, Protestant, and Jewish congregations. This makes it possible to distinguish individuals who are members of a religious minority from those who are members of the majority, allowing further insight into the connection between religious diversity and status homogamy. The municipalities are scattered over much of present-day Hungary and relate to a variety of types: rural villages, developing rural villages, urban-type villages, agrarian towns, industrializing towns, developed urban towns, and regional centers with municipal rights. The sample thus includes small villages where modernization processes (industrialization, expansion of mass education) had not yet taken place, but also small villages that industrialized and grew to become towns, as well as larger and much more modern cities.

4. Some results from this special issue

The studies in this special issue test general theories on social homogamy, using both large-scale individual data as well as measured characteristics of the communities of which those individuals were part. These communities restricted their marital options, contained their friends and family members who approved or disapproved of certain unions, and influenced their personal preferences. What did these studies find that corroborated, refuted, or refined our thinking on social homogamy in general, and the theories of modernization, romantic love, and cross-cutting circles in particular?

Roikonen and Häkkinen test modernization theory during the early stages of industrialization in late industrializing Finland. They find that social homogamy was indeed lower in industrialized and more urbanized communities. They find, too, that in regions with a higher proportion of non-Finnish-speaking people social homogamy patterns were different from those in other parts of Finland, but more so for some social classes than for others. This might indicate the influence of cross-cutting circles. They also look at the consequences of being born outside a marital union, i.e. being an 'illegitimate' child. This phenomenon was relatively widespread, at least in Europe, in the early nineteenth century. The reasons for this are much debated, but they might have had more to do with widespread poverty than with marital preferences. Whatever the cause, they find that many individuals born out of wedlock married a partner from a class lower than their own.

Seiler tests modernization theory in more and less-modernized parts of Switzerland. Being sensitive to the historical context, he also considers the presence of legal marriage restrictions for those deemed too poor to marry. These persons are excluded from marrying (and thus from marriage records). Social homogamy generally decreased with industrialization, with two exceptions. Homogamy increased due to marriage restrictions and, with industrialization, it increased for higher social classes. Seiler suggests that the latter might be related to the temporary increase in inequality in the early phases of industrialization, a phenomenon sometimes called the 'Great Gatsby curve' (Krueger, 2012; see also Knigge et al., 2014; Nielsen, 1994). Elites whose fortunes grew in times of rising inequality might have tried to keep their fortunes among themselves by carefully selecting elite spouses for their children.

Lippényi et al. find a decline in the association between bridegroom's and bride's social background in Hungary, and an initial increase and subsequent decline in the association between bridegroom's own status and bride's status of origin. More

industrial communities were characterized by less parental status homogamy; however, greater educational opportunities in a community were associated with more homogamy by bridegroom's own status. These findings are in line with the shift from ascription to achievement – as predicted by economic modernization theory – followed by the rise of romantic love. Social status homogamy is less in smaller religious groups, which indicates that cross-cutting circles are at work. This finding has a substantive value, but also a methodological one. Lippényi et al. found a stronger influence of modernization when not accounting for religious group size in the models. More modernized communities are also religiously more diverse, and had they not taken cross-cutting circles into account they would have come to incorrect conclusions about the relationship between modernization and status homogamy.

Maas and van Leeuwen find that the occupational status of the bridegroom did indeed become more important and the occupational status of his father less important when and where modernization accelerated. Modernization in the Netherlands was thus positively related to partner selection based on achieved characteristics and negatively related to partner selection based on ascribed characteristics. Some support for the romantic love hypothesis was found as well. With growing community size the importance of the bridegroom's own achieved status first increased, but at higher levels started to decrease. This is in line with the idea that at higher levels of modernization the growing importance of romantic love rendered all status characteristics less important for partner choice. At a certain point, the latter development became stronger than the shift from ascription to achievement, and the effect of bridegroom's status started to decrease. They also test whether changes in homogamy differed between the agricultural sector and other sectors, because it has been argued that changes in mobility patterns – including homogamy – are driven by changes in the size of the farming class (e.g. Xie & Killewald, 2013). They find that in the industrial and service sectors the shift from ascription to achievement was driven mainly by a decline in the importance of father's status, whereas in the agricultural sector ascription declined but achievement increased as well. Finally, status homogamy did not vary with access to mass transport, although this was assumed to foster individualistic values and a shift from ascription to achievement. This might be because travel also increased the scope for finding a partner from the same status group. Especially for smaller, dedicated groups with strong in-group preferences (e.g. elites or religious minorities), trains might have increased the possibility of marrying homogamously.

Van Leeuwen et al. (this issue) find partial support for the effect of the cross-cutting circles of language barriers on the Belgian marriage market. If bride and groom are raised speaking different languages, the importance of groom's status for partner choice is stronger. The importance of father's status seems not to have been affected however. Language barriers are not measured in an optimal way in their study though. They also find that, over time, a shift took place from homogamy on fathers' status to homogamy on groom's status. The hypothesis that in municipalities with mass transport and mass communication both homogamy by father's status and homogamy by groom's status are smaller than in municipalities without mass transport and mass communication was not supported. Mass transport did indeed weaken homogamy by social origin. However, groom's own status was more important in municipalities with access to mass transport.

Together, these findings are more in line with a shift from ascription to achievement than with a general disappearance of homogamy.

5. Thoughts on pathways for future research

One task for the future could be to extend the individual datasets back in time (this can be done for parts of Europe; see van Leeuwen, Maas, Rébaudo, and Pélissier (2016) for France in the eighteenth century), towards more recent periods (to connect with modern survey data), and expanding their global coverage. The latter is a difficult but not impossible task, as is evinced by the very recent availability of Asian data. These Asian data come in part from sources different from those used for Europe and North America (Campbell & Lee, 2008, 2011; Dong, 2016; Dong, Campbell, Kurosu, Yang, & Lee, 2015; Lee & Yoo, 2018; Lundh & Kurosu, 2014; Song & Campbell, 2017). On the one hand, occupations are less frequently stated in Asian sources, for men and certainly for women, and one needs to explore how best to use this information when making international comparisons. These extensions to the data are especially useful in testing the three theories because they allow us to compare pre-industrial, industrializing, and post-industrial societies; early and late industrializing societies; societies with more individualistic and more collectivistic values, and thus probably with differing importance attached to romantic love; and societies with weak and strong ethnic, religious, and language barriers cross cutting with social status groups.

It would also be useful to have information on those men and women whom we do not find in local marriage records, either because they did not marry (though they might have had partners) or because they married after migrating to another country. Data on the latter might become available if large individual-level datasets are linked to each other, to similar databases, and to digitized historical censuses that are increasingly becoming available (e.g. IPUMS for the USA, and IPUMS-International for other countries). Some attempts to create such linkages are at present on their way. Migration enormously extends the marriage market, and at the same time destroys the social networks of most people. For these reasons, migrants constitute good cases for testing the theories. Data on unmarried women are probably the hardest to obtain, even harder than data on unmarried men. Both unmarried men and women do appear in the historical vital registration data, e.g. as witnesses, children, or as occupants of a house in a census. But information on their partners, if any, would require non-standard – and probably rare – sources, such as diaries and letters. It can be expected that the unmarried relationships of the past were more often heterogamous, just as the marriages of the illegitimate children in Finland were (this issue). But with the increasing acceptance of such relationships, they probably became more similar to marriages.

In the case of women – both married and unmarried – it is also true that the vital registers are silent much more often regarding their social status as measured by occupation. All the articles in this special issue derive the social status of the bride from that of her father. Although unsatisfactory – as the social status of the groom is his own – the authors give good reasons for this. It is this or nothing, although marriage records might, for some contexts, contain more and useable occupational information on women than previously thought (see, for example, van Leeuwen & Zijdeman, 2014; Zijdeman, van Leeuwen, Rébaudo, & Pélissier, 2014). If the sources do contain occupational information on

women, this information relates much less often to a stepping stone in a future career than it does for men; often, women ceased to have occupations after marriage. Where we do have occupational information on women who pursued a career, this tends to relate only to unmarried women (Schulz, 2015). Future research could try to increase our knowledge of the marital choices of women by searching for special sources relating to women with certain occupations, e.g. those owning a shop (fire insurance records are one potential source), or by linking many social and demographic sources covering the same women over their life course. The latter has not often been attempted (for exceptions see Schulz, 2015; Vikström, 2003), but will become more feasible with the rise of large linked socio-demographic databases.

The articles also show that communities have a measurable impact on what at first sight seems a rather intimate choice: that of a spouse. Much of the theoretical literature has already suggested that. The collection of data on communities is still in its infancy however. More data of the type used in this special issue (e.g. from statistical yearbooks and censuses) can be gathered, but so too can ethnographical material (van Leeuwen & Maas, 2002 use ethnographic data collected by Wikman) or early surveys with similar material (Kok, 2014). To test whether the transmission of inequalities from parents to children is indeed influenced by norms on intrafamilial relations – including rules of inheritance, expectations regarding intrafamilial support, and the relative agency of women – these familial arrangements need to be measured. Recently, several historical categorizations and specific measures of family systems across the globe have been developed (Carmichael & Rijpma, 2017; Duranton, Rodríguez-Pose, & Sandall, 2009; Kok, 2017; Rijpma & Carmichael, 2016; Szołtysek, Klüsener, Poniat, & Gruber, 2017; Szołtysek & Poniat, 2018). These, too, will enhance our understanding of social homogamy in the past.

Taking the articles in this special issue together, they suggest neither that modernization theory is moribund nor that this grand dame of sociological theories on inequality is able to hold the stage on its own. On the whole, an important part of the story explaining social homogamy in the past is, indeed, about how parents and parents-in-law try to select a partner for their child who is likely to have a good future, and how first their social background (where the partners came from) and later their social future (the status their partners were likely to have) was of prime importance. But the present articles also show evidence of more complex versions of modernization theory. As to the first complication, Seiler reveals that modernization theory is generally upheld by the homogamy data on persons of lower-class or middle-class origin, but not for those on persons from higher classes. This merits further research. As a second complication, Maas and van Leeuwen find that, for the Netherlands, outside the agricultural sector the shift from ascription to achievement was driven mainly by a decline in the importance of father's status, whereas inside the agricultural sector ascription declined but achievement increased as well. It would be useful to study whether similar differences occurred in other societies. Additional and rival explanations to modernization theory have not been driven offstage. The articles in this special issue find some evidence for the role of changing personal preferences in the form of a rise of individualistic, or 'romantic' love, and they find abundant evidence of the importance of cross-cutting membership of religious and linguistic groups on partner choice. Taken together, the message does not seem to be that modernization theory is so simple that it has to abandoned, but rather that it has to be complemented.

Disclosure statement

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